

Table 2: Four-Tier Matrix

EV PLAN REQUIREMENTS

Complete an earned value plan with the designated level (1-4) based on the defined criteria below. The earned value plan is completed before the proposal kickoff meeting and is updated at contract award or at work inception for NCTA.

DEFINITIONS:

Level I Work requiring full EVMS criteria per DOD 5000.2R, or modified CPR reporting.

Level II Work identified by management as Medium to High Risk development in nature or CPFF, CPIF, or FPI Government Programs not identified above.

Level III Work identified by management as Low Risk Development or Stable Production programs.

Level IV Work identified as Spares, Repairs < \$1M, NCTA, Sunset Clause programs, CIP, B&P, and Field Service Contracts.

Required Event	Level 1	Level 2	Level 3	Level 4
Organization/Implementation				
● EV plan required	X	X	X	X
● WBS/OBS	X	X	X	
Schedules				
● Master Schedule required	X	X	X	
● Major milestones	X	X	X	X
● WBS	X	X		
● CAWA level schedules	X	X		
Work Authorization				
CAWAs used to authorize work	X	X	X	X
Planning				
● PIGM required	X	X	X	
● Baseline Plan required	X	X	X	
● BML, containing MR, UB logs	X	X		
● CAWAs to single WBS/OBS or IPT	X			
EV Status				
● Standard techniques	X	X		
● Standard techniques or other approved techniques such as Milestone Weights Percent Complete			X	X
Variance Analysis				
● Exception based—recommended 6-10 variances (incremental and value added)	X	X	X	
EAC				
● Comprehensive EACs annually	X	X		
● Periodic EAC validation	X	X	X	X
Reporting				
● CPR/CSSR et al.	X			
● Executive Summary	X	X	X	
● PFS	X	X	X	X

Legend: X—Required

Blank—Not Required

Table 3: Sample Level 1 EV Plan

{Full EVMS criteria per DOD 5000.2R, or modified CPR reporting}

Program Title: _____	Date _____
Proposal A # _____ Version _____	
P.A. # _____	Signature Approval & Date _____
Proposal Manager: _____	_____
P.M.O. _____	_____
Contracts: _____	_____
Program Control: _____	_____
Original _____ Revision _____	_____

1. Organization:

Contract Type: _____ Estimated Value: _____ Estimated Completion Date: _____
Mgt. Risk Designation: High _____ Medium _____ Low _____
Program Type: Development _____ Engineering _____ Production _____ Spares _____
Work Breakdown Structure (WBS) Level _____
Organization Breakdown Structure (OBS) Level _____
Functional CAMs or IPTs (check one) CAMs _____ IPTs _____
Product PA Yes _____ No _____
Implementation method: MPM (Micro-Frame Program Manager) required

2. Schedules:

Program Master Schedule required
CAWA level schedules (CAP) required
Scheduling Tool: Artemis _____ M/S Project _____

3. Work Authorization: (WBS Level per CDRL/PIGM):

Cost Accounts (CAWAs) required to authorize work.
The objective is to create a logical segregation of tasks for the optimal/minimal number of cost accounts.

4. Planning Requirements:

Program Initiation Ground-rules Memo (PIGM)
Baseline Plan (time-phased plan of work scope; for example, CAWA Plan)
Baseline Maintenance Log with MR and UB
Responsibility Assignment Matrix (RAM) per CDRL
CAWAs to a single WBS, OBS, or IPT

5. EV Status:

Monthly evaluation using approved System Description techniques.

6. Variance Analysis:

Monthly evaluation of significant resources per the contract and System Description.
Suggested methodology: Team resolution of major program drivers for "exception basis" problem identification on value-added areas, with subsequent progress reporting of recovery plan.
Variance Methodology: _____

7. EAC:

Latest Revised Estimate (LRE) reviewed and updated monthly.
Comprehensive EAC required annually up to 90% of program completion.

8. Reporting:

EV Executive Summary required _____
External Customer Reports: (as required) _____